FPD DM Project Plan

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EXECUTIVE SUMMARY

Background

FPD DM is a beverage company that produces coffee, tea, and organic tea. These products are sold in multiple packaging configurations. Customers of FPD DM consist of large-box retailers, specialty chains, and grocery chains.

Currently FPD DM does not have metrics to guide key decision making and planning. As a result, this has impacted customer performance related to shipment accuracy, on-time deliveries, and order lead-time fulfillment.

Objective

The objective of this project is to develop a metric dashboard that will provide FPD DM management with information that can support decision making and improved performance. Additionally, by establishing a dashboard it will facilitate information related to:

- product line sales analysis
- packaging performance by product line analysis
- product line by customer analysis
- order delivery performance by product line and customer
- distribution center shipping performance to customer

Resources

The project team will consist of subject matter experts within the FPD DM organization. This will faciliate the knowlegde of internal system and operations in the current state and help design the future state.

Risks / Opportunities

Based on our assessment of Risks we estimate that this project has the potential to encounter moderate-to-high risks. (3) Risks have been assessed as moderate and (2) Risks have been assessed as Major. However, it should be noted that through our assessments we believe that these Risks can be mitigated while still maintaining the project estimated timelines.

Schedule / Timelines

Our assessment of the project timelines indicates that the shortest project duration based on our Critical Path is 6.74 weeks. Therefore, we believe that this project can be completed within the time requirements specified by FPD DM management.

Financial Considerations

The project costs estimation for this project include a 10% contingency which remain below the desired budget. Our estimates based on these consideration for the specified deliverables is $111,134.

Approval to proceed

The FPD DM project assessment indicates that this project can be implemented based on technical, financial, and schedule requirements. Our assessments indicate that this project can be supported by internal resources with a contigency plan in place for the identified risks. Additionally, we believe this project can be completed within the desired schedule and below the planned budget. Based on these assessments we believe that this project is feasible. At this time, we would request the approval of management to proceed with this project.

SCOPE STATEMENT

The Scope statement provides details regarding what is expected to be delivered when the project is complete. It includes deliverables, milestones, technical requirements, limits and exclusions, and a formal review with the customer.

PROJECT ID.	DATE SUBMITTED
FPD DM	03/15/2020
PROJECT OBJECTIVES	
To construct a dashboard that will provide metrics and improve sales & operations information for management decision making within a timeframe of 6-months and at a budget not to exceed $250,000.	

Project Deliverables

No.	DELIVERABLE	DESCRIPTION
1	Create an information/metrics dashboard for sales and operations management	including, but not limited to: • Product Line sales analysis • Packaging performance by product line analysis • Product Line by Customer analysis • Order delivery performance by product line and customer • Distribution center shipping performance to customer
2	Ensure efficient delivery of data processing	Data needed to be processed as quickly as possible
3	Provide continuous availability of dashboard	Access to the dashboard needs to be 24 x 7 and short response time needed
4	Deliver accessibility for marketing, sales, and associated devices	Marketing and sales personnel need to access the data anywhere and on any authorized device (smart phone, tablet, laptop, desktop)
5	Safeguard Security for FPD data	Security over dashboard access is important, since proprietary FPD data is exposed
6	Implement the use of AI & Cloud tools	project must use preliminary data with the AI tools to formulate/test the analytics models, then use these analytic models on the sourced data (data quality/ completeness/… is suspect) to populate the dashboard

Project Milestones

TASK NO.	DESCRIPTION	MILESTONE DATES
1	Define Requirements	4/15/2020
2	Dashboard Design	5/22/2020
3	Data Extraction	6/05/2020
4	Data Metrics	6/19/2020
5	Dashboard Build	7/06/2020
6	Training	8/03/2020
7	Dashboard Deployment	9/15/2020

Technical Requirements

NO.	DESCRIPTION
1	Dashboard network must have remote availability
2	Consolidated FPD server data must be updated and pushed to cloud storage frequently
3	Cloud storage must be able to process large data requests quickly with minimal delay
4	Network security must be in place and meet protocols for data protection (Encryption)
5	Authorized user devices must have existing security protocols in place to safeguard the information that is being accessed

Limits and Exclusions

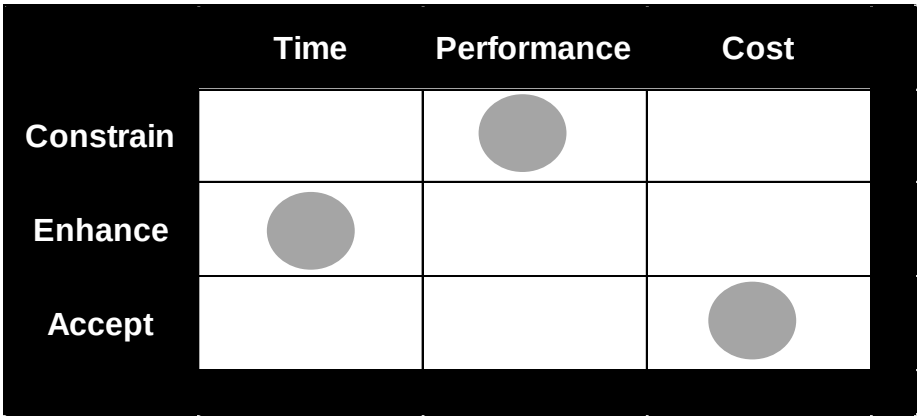
NO.	DESCRIPTION
1	The metric dashboard will be designed based on the original specifications provided by the customer
2	Work onsite is during normal business hours (8 am – 5 pm) M - F
3	Customer to provide access to Qlik Sense tools
4	FPD DM Team member AI training not to exceed 1-week
5	Functional Dashboard based on customer specifications will be created but no training will be given

Review with Customer

STAKEHOLDER NAME & TITLE	ROLE OF STAKEHOLDER / APPROVER	DATE SUBMITTED FOR APPROVAL	DATE APPROVAL RECEIVED
Barbara Coffee	CEO / Chairman EOC	3/15/2020	
Paul Reporting	CFO / Sponsor / EOC Team	3/15/2020	
Frank Modruson	CIO / EOC Team	3/15/2020	
Steve James	VP Marketing / EOC Team	3/15/2020	
Bill Gates	IT Manager / EOC Team	3/15/2020	

PRIORITY MATRIX

The priority matrix criterion provides an overview of the critical elements within the FPD DM project. It consists of Time, Performance, and Cost. Because these key elements tend to compete for priorities over the course of the project, we use this matrix to make the most sensible decision respective of the tradeoffs (Constrain, Enhance, and Accept). The (3) parameters are defined below:



NO.	Parameter	Description	Level
1	Constrain	No changes permitted and critical to project	High priority level
2	Enhance	Prospect for optimization	Med priority level
3	Accept	Permissible for change	Low priority level

WORK BREAKDOWN STRUCTURE (WBS)

WBS Approach and Explanation

WBS setup:

The FPD DM work break down structure (WBS) provides a break-down of major project work deliverables into sub-deliverables. The hierarchical framework helps to ascertain the work that will be carried out by the project team for the duration of the project. Our approach to creating the WBS started with identifying the major deliverables for this project. Next, we evaluated each major deliverable and broke them down into sub-deliverables. At the lowest level of decomposition, we identified the work packages. As a result, these control points allow the project team to identify and track associated activity cost, duration, and resources.

Estimation approach:

Our estimation approach for project tasks consisted of three types: 1) Consensus, 2) Template, and 3) Hybrid.

Consensus:

- The Consensus estimation (Top-Down) was used for tasks related to training dashboard users. This option provided a best-guesstimate of the activity durations based on pooled-experience. Therefore, as a result of the collective feedback and consensus from FPD DM management we determined the effort required to support these tasks.

Template:

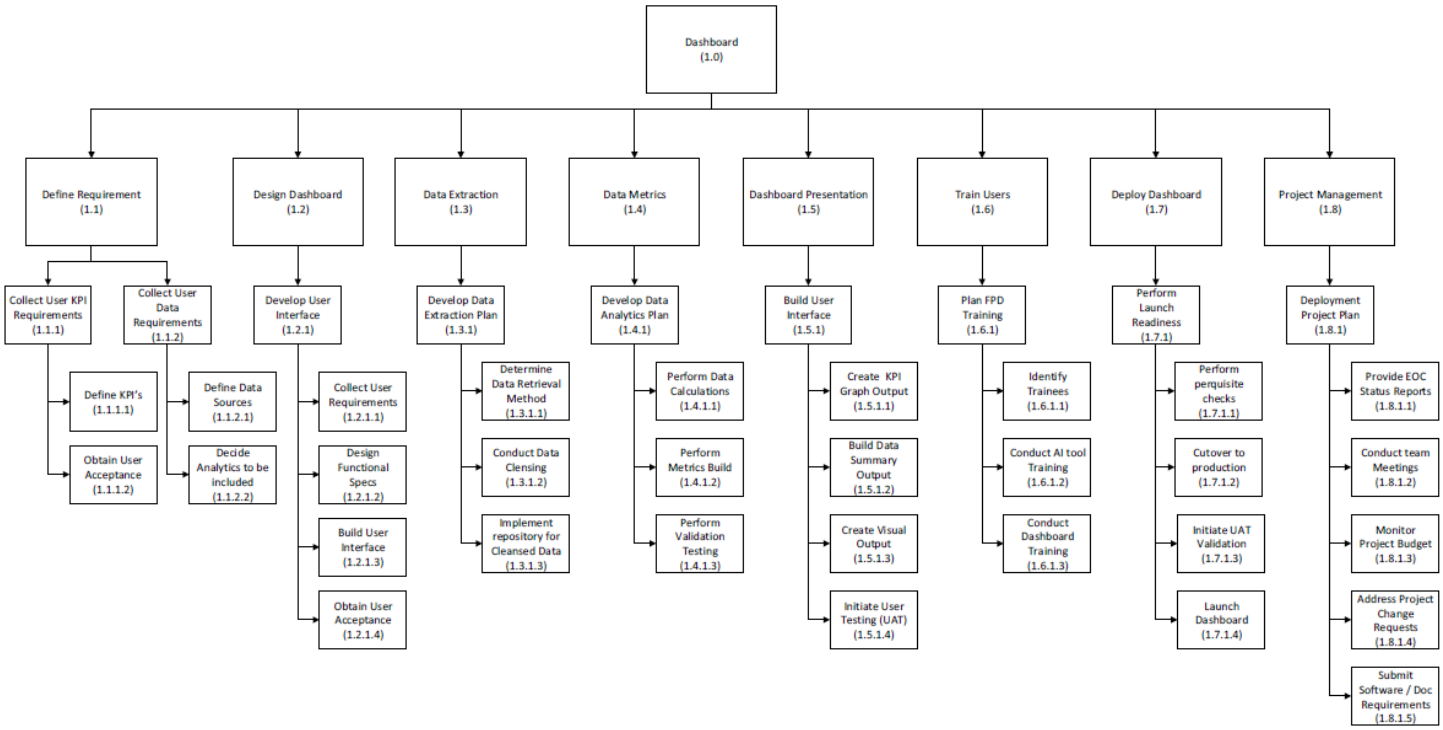
- The Template method (Bottom-Up) was used based on past project tasks that we were able to reference. This information provided a guide on the estimates and costs associated with these project activities. We selected this approach because it establishes a historical reference as a guideline.

Hybrid:

- The Hybrid method was used for the data extraction activities. This approach was used due to the unknown elements related to supporting these activities such as the time required to extract data and the amount of data that can be extracted at once. However, once we have a better insight into this information, we can then refine our estimates to better reflect the time components and costs.

WBS

The below chart represents the FPD DM Work Break Down Structure. This level of detail allows the project team to identify deliverables and work packages. Each element is assigned a specific numbering respective of their level (1,2,3,4, etc.).



WBS Dictionary

The WBS Dictionary is a detailed document that provides the WBS level, WBS Code, Element Name, and Definition. It also provides an alternative view of the FPD DM work packages in respect to predecessors and successors.

Level	WBS Code	Element Name	Definition
1	1.0	FPD DM Dashboard	To define, design, and create an FPD DM metric Dashboard
2	1.1	Define Requirements	Establish the core requirements for the FPD DM Dashboard
3	1.1.1	Collect User KPI Requirements	Collect information related to KPI's that are required for the FPD DM Dashboard
4	1.1.1.1	Define KPI's	Establish how KPI's will be defined / measured
4	1.1.1.2	Obtain User Acceptance	Collect approval from stakeholders regarding the defined KPI's
3	1.1.2	Collect User Data Requirements	Collect information related to the dashboard data
4	1.1.2.1	Define Data Sources	Establish where the data will come from and how it will be collected
4	1.1.2.2	Decide Analytics to be Included	Determine the analytics that will be needed to support the associated KPI's
2	1.2	Design Dashboard	To establish the overall design and interface of the FPD DM Dashboard
3	1.2.1	Develop User Interface	Determine the interaction between the user and the Dashboard
4	1.2.1.1	Collect User Requirements	Collect the requirements for how the Dashboard will be accessed
4	1.2.1.2	Design Functional Specs	Create a design that will allow the users to collect their requirements
4	1.2.1.3	Builds User Interface	Build the interface based on user specifications
4	1.2.1.4	Obtain User Acceptance	Review and obtain approval from the user
2	1.3	Acquire/Install Hardware	To determined Hardware requirements and perform the required implementation
3	1.3.1	Determine Technical Requirements	Determine current state and the technical requirements
4	1.3.1.1	Identify Hardware Needs	Establish what are the hardware needs for supporting this project
4	1.3.1.2	Make Hardware Selection	Select the appropriate hardware
4	1.3.1.3	Purchase Hardware	Obtain approval to purchase the hardware
4	1.3.1.4	Test Hardware	Testing of the new hardware and compatibility
4	1.3.1.5	Deploy Hardware	Deployment of the new hardware into production
2	1.4	Construct/Install Software	To determined software requirements and perform the required implementation
3	1.4.1	Determine Technical Requirements	Determine current state and the technical requirements

Level	WBS Code	Element Name	Definition
4	1.4.1.1	Determine Software Needs	Establish what are the software needs for supporting this project
4	1.4.1.2	Make Software Selection	Select the appropriate software
4	1.4.1.3	Purchase Software	Obtain approval to purchase the software
2	1.5	Test Software	Testing of the new software and compatibility
3	1.5.1	Perform System Testing	Perform system integrated related testing
4	1.5.1.1	Prepare Integration Test Plan	Develop a plan for software integration
4	1.5.1.2	Deploy Test Environment	Test the software in the test environment
4	1.5.1.3	Perform UAT Testing	Obtain approval from user on functionality
4	1.5.1.4	Complete Software Testing	Deployment of the new software into production
2	1.6	Train Users	To execute the necessary training for the FPD Dashboard
3	1.6.1	Plan FPD Training	Planning requirements for the project
4	1.6.1.1	Identify Trainees	Identify the process owners whom will be required to be trained
4	1.6.1.2	Conduct AI Tool Training	Incorporate AI tools training for FPD team members
4	1.6.1.3	Conduct Dashboard Training	Train team members on Dashboard functionality
2	1.7	Deploy Dashboard	Key actions to support the final deployment of the FPD DM Dashboard
3	1.7.1	Perform Launch Readiness	Review all key deliverables in place with team members
4	1.7.1.1	Preform Prerequisite Checks	Perform a walkthrough of user requirements and deliverables
4	1.7.1.2	Cutover to Production	Perform the cutover from testing environment to production
4	1.7.1.3	Initiate UAT Validation	Initiate user testing for final validation
4	1.7.1.4	Launch Dashboard	Launch Dashboard – Live access given to appropriate teams
2	1.8	Project Management - FT	PM actions needed to support this project
3	1.8.1	Deployment Project Plan	Key activities to be delivered over the course of the project
4	1.8.1.1	Provide EOC Status Reports	Status reports to the EOC indicating the overall health of the project
4	1.8.1.2	Conduct Team Meetings	PM team and customer process owner meetings to address project related topics
4	1.8.1.3	Monitor Project Budget	Project budget to be addressed with the EOC
4	1.8.1.4	Address Project Change Requests	Change requests that have been logged and addressed with the EOC

Schedule

The cost schedule provides task level details related to the WBS ID, Name, duration, and costs. In addition, it indicates what approaches were used for estimation. A key output of this schedule is the estimation for total labor costs, Total Expenses, and Total Project costs.

Part 1 of 2:

WBS ID	Task Description	Task Assigned to	Time-Cost Labor Estimates									# of Resources	Calendar duration
			Estimate (hrs)	Estimating Approach	Estimated Duration (hrs) (Estimate * 1.5)	Estimated Interruptions (hrs) (Estimate * 0.33)	Total Effort (hrs)	Labor Rate $/hr	Labor Cost Total $	Expenses	Total Costs		
1.0	Project FPD DM Dashboard								$ 155,448	$ 10,000	$ 165,448		
1.1	Define Requirements								*$ 11,976*	$ -	*$ 11,976*		
1.1.1	Collect User KPI Requirements												
1.1.1.1	Define KPI's	Mark, Lee, Otto	20	Template (BU)	20.0	6.6	26.6	$60	$ 1,596		$ 1,596	3	8.87
1.1.1.2	Obtain User Acceptance	Mark, Lee, Otto	20	Template (BU)	20.0	6.6	26.6	$60	$ 1,596		$ 1,596	3	8.87
1.1.2	Collect User Data Requirements	Mark, Lee, Otto	20	Template (BU)	30.0	6.6	36.6	$60	$ 2,196		$ 2,196	3	12.20
1.1.2.1	Define Data Sources	Mark, Lee, Otto	40	Template (BU)	60.0	13.2	73.2	$60	$ 4,392		$ 4,392	3	24.40
1.1.2.2	Decide Analytics to be Included	Mark, Lee, Otto	20	Template (BU)	30.0	6.6	36.6	$60	$ 2,196		$ 2,196	3	12.20
1.2	Design Dashboard				0.0	0.0	0.0		*$ 15,811*	$ -	*$ 15,811*		
1.2.1	Develop User Interface												
1.2.1.1	Collect User Requirements	Mark, Lee, Otto, Sims, Ray	40	Template (BU)	60.0	13.2	73.2	$60	$ 4,392		$ 4,392	5	14.64
1.2.1.2	Design Functional Specs	Mark, Lee, Otto, Sims, Ray	40	Template (BU)	60.0	13.2	73.2	$60	$ 4,392		$ 4,392	5	14.64
1.2.1.3	Builds User Interface	Mark, Lee, Otto, Sims, Ray	40	Template (BU)	60.0	13.2	73.2	$60	$ 4,392		$ 4,392	5	14.64
1.2.1.4	Obtain User Acceptance	Mark, Lee, Otto	24	Template (BU)	36.0	7.9	43.9	$60	$ 2,635		$ 2,635	3	14.64
1.3	Data Extraction				0.0	0.0	0.0		*$ 15,372*	$ -	*$ 15,372*		
1.3.1	Develop Data Extraction Plan												
1.3.1.1	Determine Data Retrieval Method	Mark, Lee, Otto, Sims, Ray	40	Hybrid	60.0	13.2	73.2	$60	$ 4,392		$ 4,392	5	14.64
1.3.1.2	Conduct Data Cleansing	Mark, Lee, Otto, Sims, Ray	40	Hybrid	60.0	13.2	73.2	$60	$ 4,392		$ 4,392	5	14.64
1.3.1.3	Implement Repository for Cleansed Data	Mark, Lee, Otto	60	Hybrid	90.0	19.8	109.8	$60	$ 6,588		$ 6,588	3	36.60
1.4	Data Metrics				0.0	0.0	0.0		*$ 10,980*	$ -	*$ 10,980*		
1.4.1	Develop Data Analytics Plan												
1.4.1.1	Perform Data Calculations	Mark, Lee, Otto, Sims, Ray	40	Template (BU)	60.0	13.2	73.2	$60	$ 4,392		$ 4,392	5	14.64
1.4.1.2	Perform Metrics Build	Mark, Lee, Otto	40	Template (BU)	60.0	13.2	73.2	$60	$ 4,392		$ 4,392	3	24.40
1.4.1.3	Perform Validation Testing	Mark, Lee, Otto	20	Template (BU)	30.0	6.6	36.6	$60	$ 2,196		$ 2,196	3	12.20

Part 2 of 2:

WBS ID	Task Description	Task Assigned to	Time-Cost Labor Estimates: Estimate (hrs)	Estimating Approach	Estimated Duration (hrs) (Estimate * 1.5)	Estimated Interruptions (hrs) (Estimate * 0.33)	Total Effort (hrs)	Labor Rate $/hr	Labor Cost Total $	Expenses	Total Costs	# of Resources	Calendar duration
1.5	Dashboard Presentation				0.0	0.0	0.0		*$ 17,568*	*$ -*	*$ 17,568*		
1.5.1	Build User Interface												
1.5.1.1	Create KPI Graph Output	Mark, Lee, Otto	40	Template (BU)	60.0	13.2	73.2	$60	$ 4,392		$ 4,392	3	24.40
1.5.1.2	Build Data Summary Output	Mark, Lee, Otto, Sims, Ray	40	Template (BU)	60.0	13.2	73.2	$60	$ 4,392		$ 4,392	5	14.64
1.5.1.3	Create Visual Output	Mark, Lee, Otto, Sims, Ray	40	Template (BU)	60.0	13.2	73.2	$60	$ 4,392		$ 4,392	5	14.64
1.5.1.4	Initiate User Testing (UAT)	Mark, Lee, Otto, Sims, Ray	40	Template (BU)	60.0	13.2	73.2	$60	$ 4,392		$ 4,392	5	14.64
1.6	Train Users				0.0	0.0	0.0		*$ 9,662*	*$ 10,000.00*	*$ 19,662*		
1.6.1	Plan FPD Training												
1.6.1.1	Identify Trainees	Mark, Lee, Otto	8	Consensus (TD)	12.0	2.6	14.6	$60	$ 878		$ 878	3	4.88
1.6.1.2	Conduct AI Tool Training	Mark, Lee, Otto	40	Consensus (TD)	60.0	13.2	73.2	$60	$ 4,392	$10,000.00	$ 14,392	3	24.40
1.6.1.3	Conduct Dashboard Training	Mark, Lee, Otto, Sims, Ray	40	Consensus (TD)	60.0	13.2	73.2	$60	$ 4,392		$ 4,392	5	14.64
1.7	Deploy Dashboard				0.0	0.0	0.0		*$ 9,662*	*$ -*	*$ 9,662*		
1.7.1	Perform Launch Readiness												
1.7.1.1	Preform Prerequisite Checks	Mark, Lee, Otto, Sims, Ray	40	Template (BU)	60.0	13.2	73.2	$60	$ 4,392		$ 4,392	5	14.64
1.7.1.2	Cutover to Production	Mark, Lee, Otto, Sims, Ray	16	Template (BU)	24.0	5.3	29.3	$60	$ 1,757		$ 1,757	5	5.86
1.7.1.3	Initiate UAT Validation	Mark, Lee, Otto, Sims, Ray	24	Template (BU)	36.0	7.9	43.9	$60	$ 2,635		$ 2,635	5	8.78
1.7.1.4	Launch Dashboard	Mark, Lee, Otto, Sims, Ray	8	Template (BU)	12.0	2.6	14.6	$60	$ 878		$ 878	5	2.93
1.8	Project Management - FT				0.0	0.0	0.0		*$ 64,416*	*$ -*	*$ 64,416*		
1.8.1	Deployment Project Plan												
1.8.1.1	Provide EOC Status Reports	Mark	40	Template (BU)	60.0	13.2	73.2	$80	$ 5,856		$ 5,856	1	73.20
1.8.1.2	Conduct Team Meetings	Mark, Lee	160	Template (BU)	240.0	52.8	292.8	$120	$ 35,136		$ 35,136	2	146.40
1.8.1.3	Monitor Project Budget	Mark, Otto	80	Template (BU)	120.0	26.4	146.4	$80	$ 11,712		$ 11,712	2	73.20
1.8.1.4	Address Project Change Requests	Mark	40	Template (BU)	60.0	13.2	73.2	$80	$ 5,856		$ 5,856	1	73.20
1.8.1.5	Submit Software / Doc Requirements	Mark	8	Template (BU)	60.0	13.2	73.2	$80	$ 5,856		$ 5,856	1	24.40
	Total								**$ 155,448**	**$ 10,000**	**$ 165,448**		

COMMUNICATION PLAN

The communication plan is used to plan the flow of information to stakeholders and project team members. The objective of this plan is to map out who, what, and when information will be transmitted.

What Information	Target Audience	When?	Communication method	Provider	Deliverable
Team meeting	To track progress, discuss and resolve issues, manage risk	Weekly	Web meeting	Project team	Progress report Risk log update Issue log update Meeting minutes
Project issues	EOC and Senior management	Weekly	Meeting	Project Manager	Issue log update
Internal technical team meeting	Focus on technical issues and questions	Weekly	Web meeting, teleconference	Associate PM lead	Meeting minutes, Q&A log, Issue log update
Project status reports	EOC and Senior management	Bi-weekly	E-mail	Project Manager	Project status report w/ red, yellow, green indicators
Project Budget review	EOC	Monthly	Meeting	Project Manager	Updated budget
Project change requests	EOC and Senior management	As required	E-mail	Project Manager	Updated Change request log

AON NETWORK DIAGRAM

AON Approach and Explanation

AON setup:

The Activity-On-Node (AON) diagram provides a network view of project activities, sequences, and interrelationships. The activities in this diagram are represented by a box (or node). Each activity is represented in a sequence of completion. Additionally, each activity has arrows indicating the preceding direction and the ensuing path. A key output of this diagram is that it identifies the Critical Path. The Critical Path represents the longest path through the network and the shortest project duration.

AON Key Setup Details:

Duration:

- The duration for each activity was captured from the WBS
- Hours have been converted into weeks in this diagram (example: hours to weeks [divided by 40])

AON Network Activity Reference

Below is a reference document for the AON labels and their associated work packages. Each activity corresponds to a rollup of specific work packages. Also included is information referencing the WBS code, element name, and definition.

Part 1 of 2:

Activity	Activity Description	WBS Code	Element Name	Definition
A	Define Requirements	1.0	FPD DM Dashboard	To define, design, and create an FPD DM metric Dashboard
		1.1	Define Requirements	Establish the core requirements for the FPD DM Dashboard
		1.1.1	Collect User KPI Requirements	Collect information related to KPI's that are required for the FPD DM Dashboard
		1.1.1.1	Define KPI's	Establish how KPI's will be defined / measured
		1.1.1.2	Obtain User Acceptance	Collect approval from stakeholders regarding the defined KPI's
		1.1.2	Collect User Data Requirements	Collect information related to the dashboard data
		1.1.2.1	Define Data Sources	Establish where the data will come from and how it will be collected
		1.1.2.2	Decide Analytics to be Included	Determine the analytics that will be needed to support the associated KPI's
B	Dashboard Design	1.2	Design Dashboard	To establish the overall design and interface of the FPD DM Dashboard
		1.2.1	Develop User Interface	Determine the interaction between the user and the Dashboard
		1.2.1.1	Collect User Requirements	Collect the requirements for how the Dashboard will be accessed
		1.2.1.2	Design Functional Specs	Create a design that will allow the users to collect their requirements
		1.2.1.3	Builds User Interface	Build the interface based on user specifications
		1.2.1.4	Obtain User Acceptance	Review and obtain approval from the user
C	Data Extraction	1.3	Data Extraction	To develop a plan that will be used for collecting data
		1.3.1	Develop Data Extraction Plan	Deliverables that will be executed to support data requirements
		1.3.1.1	Determine Data Retrieval Method	To determine data retrieval sources and how they will be performed
		1.3.1.2	Conduct Data Cleansing	Cleaning of relevant data that will feed into the Dashboard
		1.3.1.3	Implement Repository for Cleansed Data	Storage of the cleansed data

Activity	Activity Description	WBS Code	Element Name	Definition
D	Data Metrics	1.4	Data Metrics	Metrics and associated calculations
		1.4.1	Develop Data Analytics Plan	The plan that will incorporate the calculations and metric deliverables
		1.4.1.1	Perform Data Calculations	Establishes the base calculations for KPI's
		1.4.1.2	Perform Metrics Build	Building of the KPI's by implementing the appropriate calculations
		1.4.1.3	Perform Validation Testing	Validating output data meets calculation and metric requirements

Part 2 of 2:

Activity	Activity Description	WBS Code	Element Name	Definition
E	Dashboard Build	1.5	Dashboard Presentation	Overall presentation of the FPD DM dashboard
		1.5.1	Build User Interface	Establish an interface for FPD DM users
		1.5.1.1	Create KPI Graph Output	Create graph outputs for the KPI's
		1.5.1.2	Build Data Summary Output	Establish a summary output for the KPI's
		1.5.1.3	Create Visual Output	The creation of dashboard content including headers, pages, and design
		1.5.1.4	Initiate User Testing (UAT)	User acceptance testing in test dashboard environment
F	Training	1.6	Train Users	To execute the necessary training for the FPD Dashboard
		1.6.1	Plan FPD Training	Planning requirements for the project
		1.6.1.1	Identify Trainees	Identify the process owners whom will be required to be trained
		1.6.1.2	Conduct AI Tool Training	Incorporate AI tools training for FPD team members
		1.6.1.3	Conduct Dashboard Training	Train team members on Dashboard functionality
G	Dashboard Deployment	1.7	Deploy Dashboard	Key actions to support the final deployment of the FPD DM Dashboard
		1.7.1	Perform Launch Readiness	Review all key deliverables in place with team members
		1.7.1.1	Preform Prerequisite Checks	Perform a walkthrough of user requirements and deliverables
		1.7.1.2	Cutover to Production	Perform the cutover from testing environment to production
		1.7.1.3	Initiate UAT Validation	Initiate user testing for final validation
		1.7.1.4	Launch Dashboard	Launch Dashboard – Live access given to appropriate teams
Project Planning		1.8	Project Management - FT	PM actions needed to support this project
		1.8.1	Deployment Project Plan	Key activities to be delivered over the course of the project
		1.8.1.1	Provide EOC Status Reports	Status reports to the EOC indicating the overall health of the project
		1.8.1.2	Conduct Team Meetings	PM team and customer process owner meetings to address project related topics

Activity	Activity Description	WBS Code	Element Name	Definition
		1.8.1.3	Monitor Project Budget	Project budget to be addressed with the EOC
		1.8.1.4	Address Project Change Requests	Change requests that have been logged and addressed with the EOC
		1.8.1.5	Submit Software / Doc Requirements	Any hardware/software requirements must to be documented and submitted

Activity Duration Chart

The below AON Duration Chart provides an alternate view of the activities and their respective duration. Each activity indicates the Early Stat (ES), Late Start (LS), Early Finish (EF), Late Finish (LF), and Slack. These values were determined by performing a forward-pass and backward pass evaluation though the network of activities. This procedure assisted with the identification of the Critical Path. Each activity that is on the Critical Path has been indicated below. Also captured is the duration for the Critical Path which was 6.74 weeks.

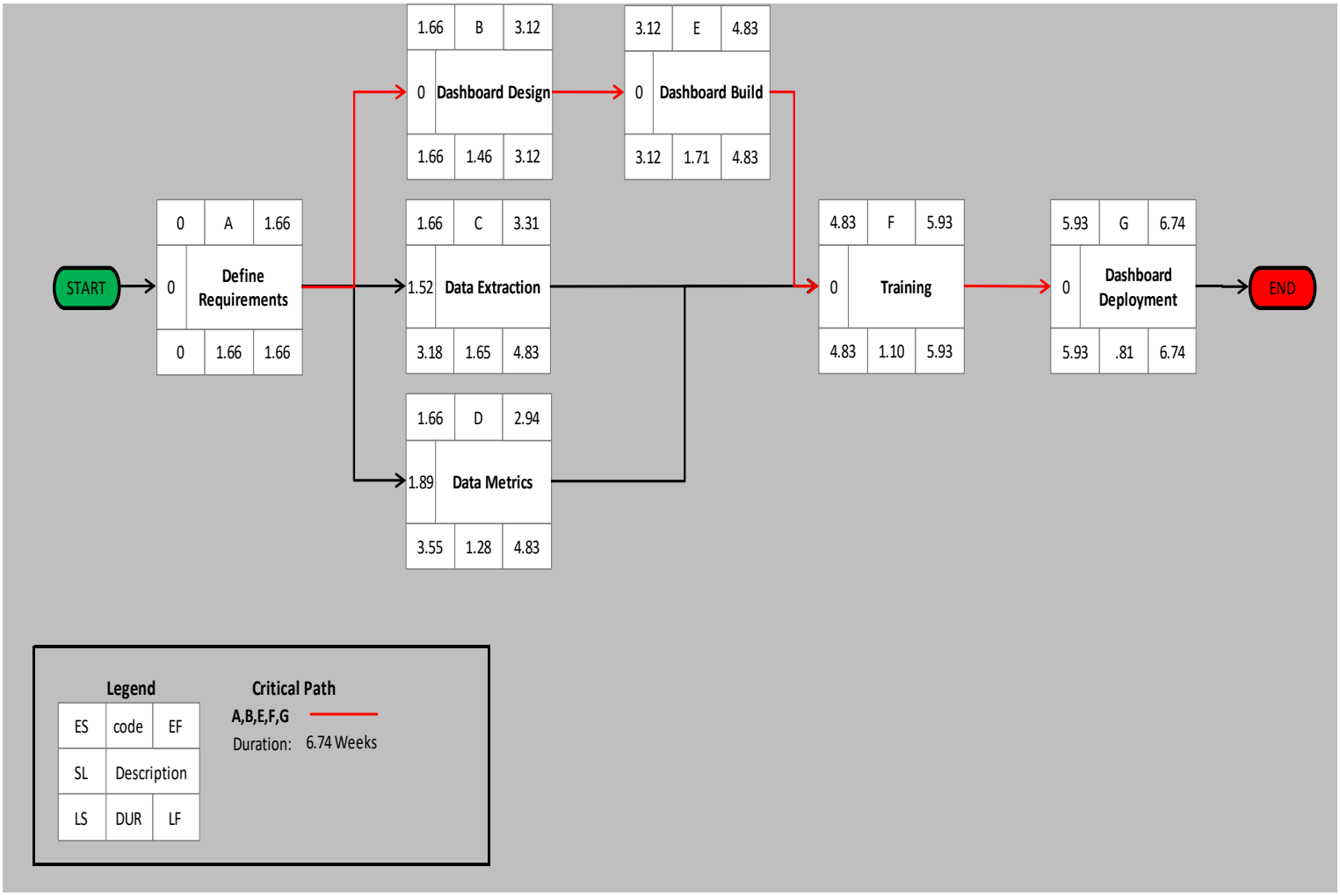
NAME	FPD DM: AON

Activity	Duration	ES	LS	EF	LF	Slack	Critical Activity
A	1.66	0	0	1.66	1.66	0	Yes
B	1.46	1.66	1.66	3.12	3.12	0	Yes
C	1.65	1.66	3.18	3.31	4.83	1.52	No
D	1.28	1.66	3.55	2.94	4.83	1.89	No
E	1.71	3.12	3.12	4.83	4.83	0	Yes
F	1.1	4.83	4.83	5.93	5.93	0	Yes
G	0.81	5.93	5.93	6.74	6.74	0	Yes

Critical Path	A, B, E, F, G
Critical Path Duration	6.74 Weeks

AON Diagram

The below AON diagram depicts the project activities and the Critical Path for the FPD DM project. The Critical Path is indicated by red arrows (path: A,B,E,F,G). This path indicates a duration of 6.74 weeks. Because there is not any slack in these activities, they represent the shortest project duration because this path cannot be completed in less time.



AON Diagram – Analysis and Conclusion

Analysis:

The analysis of work packages that were identified in the WBS document assisted with creating activities in the AON network diagram. This process resulted in the creation of seven activities in our AON diagram. Also factored were the total duration of each work package that is represented in each activity-node. Each activity was then converted into weeks (hours divided by 40). Furthermore, activity predecessors and successor were established to indicate sequence and interdependencies.

Conclusion:

The results indicate that the critical path for FPD DM is activities A,B,E,F,G. The duration on this path is 6.74 weeks. Because this is the Critical Path it indicates that the shortest duration for the project is 6.74 weeks. Also, of importance is that any delays to activities on the Critical Path will result in a delay to the project for that time.

PROJECT BASELINE BUDGET

The baseline budget depicts the distribution of project costs over the time periods of the project.

NAME	FPD DM: Baseline Budget

Activity/ Work Pkg	Duration	ES	LS	EF	LF	Slack	Total Costs	0	1	2	3	4	5	6	7
A	1.66	0	0	1.66	1.66	0	$11,976.00	$7,185.60	$4,790.40						
B	1.46	1.66	1.66	3.12	3.12	0	$15,811.00		$3,162.20	$10,909.59	$1,739.21				
C	1.65	1.66	3.18	3.31	4.83	1.52	$15,372.00		$1,537.20	$3,843.00	$3,843.00	$6,148.80			
D	1.28	1.66	3.55	2.94	4.83	1.89	$10,980.00		$1,098.00	$2,745.00	$2,745.00	$4,392.00			
E	1.71	3.12	3.12	4.83	4.83	0	$17,568.00				$8,959.68	$8,608.32			
F	1.1	4.83	4.83	5.93	5.93	0	$19,662.00					$3,735.78	$15,926.22		
G	0.81	5.93	5.93	6.74	6.74	0	$9,662.00						$579.72	$9,082.28	
							Total PV by Period:	$7,185.60	$10,587.80	$17,497.59	$17,286.89	$22,884.90	$16,505.94	$9,082.28	
							Cumulative PV by Period	$7,185.60	$17,773.40	$35,270.99	$52,557.88	$75,442.78	$91,948.72	$101,031.00	

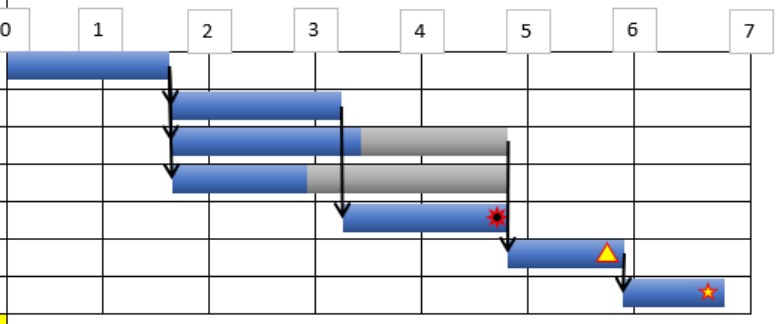
Critical Path	A, B, E,F,G
Critical Path Duration	6.74 Wks

Gantt Chart with Milestones

The below Gantt provides project schedule details and milestones.

NAME	FPD DM: Gantt Chart

Activity/ Work Pkg	Duration	ES	LS	EF	LF	Slack
A	1.66	0	0	1.66	1.66	0
B	1.46	1.66	1.66	3.12	3.12	0
C	1.65	1.66	3.18	3.31	4.83	1.52
D	1.28	1.66	3.55	2.94	4.83	1.89
E	1.71	3.12	3.12	4.83	4.83	0
F	1.1	4.83	4.83	5.93	5.93	0
G	0.81	5.93	5.93	6.74	6.74	0
Critical Path	A, B, E,F,G					
Critical Path Duration	6.74 Wks					



Legend	
	Baseline Path
	Slack
Milestones	
	Dashboard Interface complete
	All Dashboard users trained
	Dashboard ready for deployment

PROJECT RISK ASSESSMENT

RISK ASSESSMENT FORM

The Risk Assessment Form provides an overview of the associated risk and the respective risk-level. In the below box labeled *Risk Form Definition* we have created a Risk ID, the definition that is associated with this Risk, and the Risk Event. In the *Risk Form* box, we have provided the Risk Event and evaluation factors such as the Likelihood, Impact, and Detection Difficulty.

Risk Form Definition

Risk ID	Risk Definition	Risk Event
R1	Receiving unclean data with low data integrity and missing elements	Data integrity issues
R2	Requiring additional resources to meet schedule due to other duties and lack of appropriate skills/experience	Resource shortage
R3	Define/socialize/accept performance metrics (how to calculate)	User backlash
R4	Running over budgetary constraints initially assigned to the project	Budget overages
R5	Software system error prior to dashboard delivery	Software issues

Risk Form

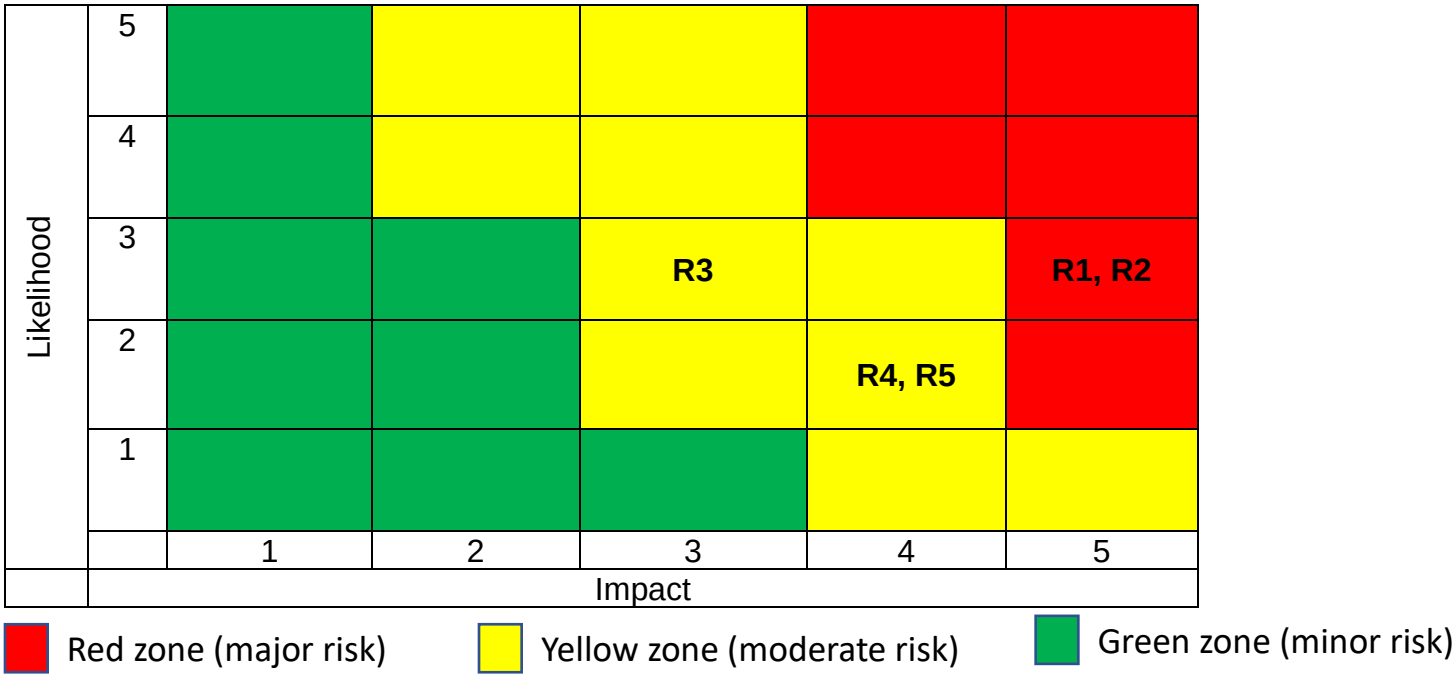
Risk ID	Risk Event	Likelihood	Impact	Detection Difficulty	When
R1	Data integrity issues	3	5	2	Data Extraction
R2	Resource shortage	3	5	3	Critical Path Activities
R3	User backlash	3	3	2	Metric Requirements
R4	Budget overages	2	4	3	Execution phase
R5	Software issues	2	4	2	System integration

Risk Values Legend

Risk Score (Likelihood / Impact)	Defined Impact
1	Very Low
2	Low
3	Moderate
4	High
5	Very High

RISK SEVERITY MATRIX

The Risk Severity Matrix provides visibility to the identified risks based on “Likelihood” (Y-axis) and “Impact” (X-axis). This matrix also contains colors (Green, Yellow, Red) to indicate the severity of that risk. Green is considered a minor risk. Yellow is considered a moderate risk. Red is considered a major risk.



PROJECT RISKINESS

Based on our assessment of Risks we estimate that this project has the potential to encounter moderate-to-high risks. (3) Risks have been assessed as moderate and (2) Risks have been assessed as Major. However, it should be noted that through our assessments we believe that these Risks can be mitigated while still maintaining the project estimated timelines.

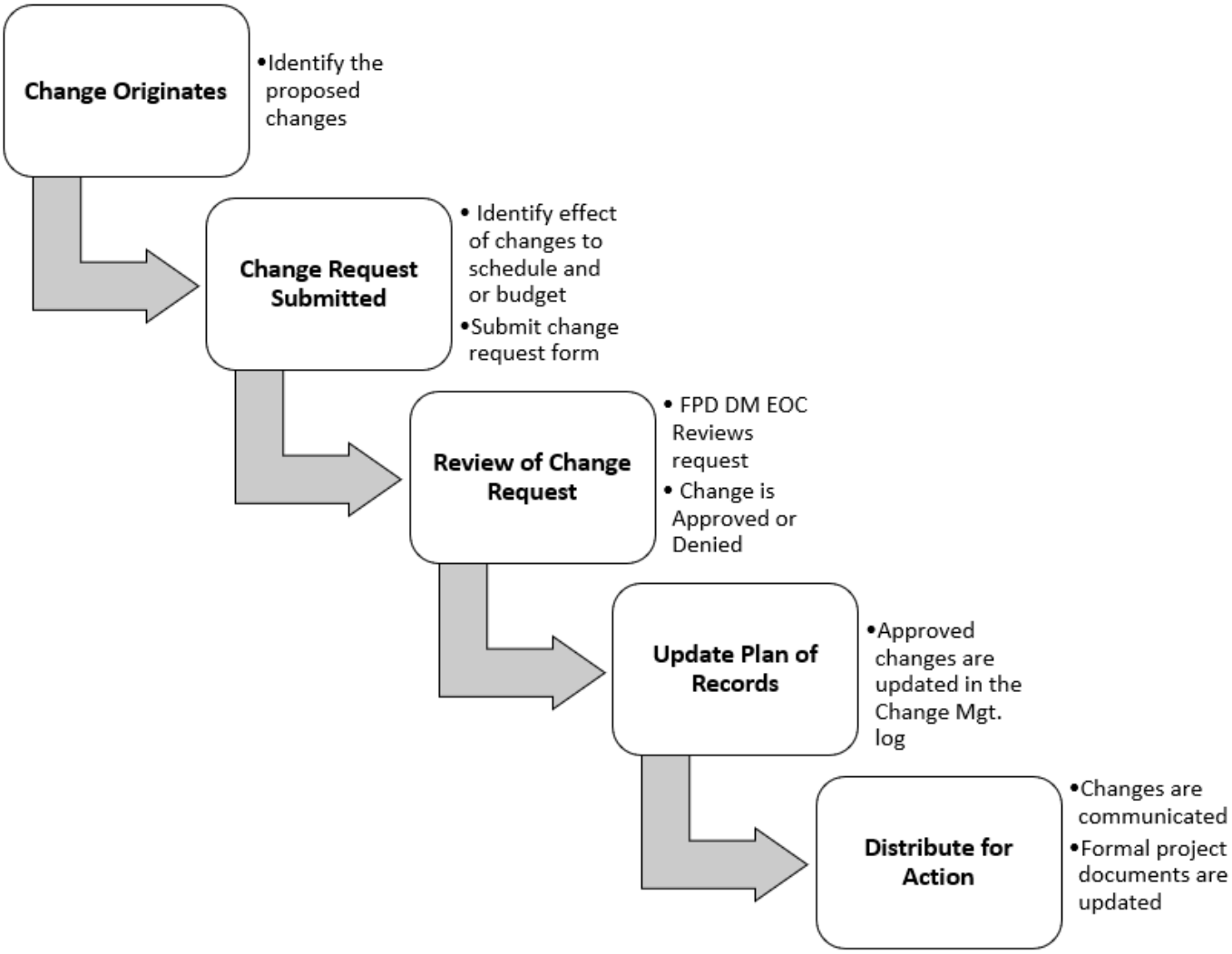
RISK RESPONSE MATRIX

The Risk Response Matrix provides the decision regarding the response for a given event. Its intent is to ensure the project team is prepared to address identified risks.

Risk ID	Risk Event	Response	Contingency Plan	Trigger	Responsible Party
R1	Data integrity issues	Mitigate: IT department will work with dashboard vendor to solve data issue	User will use pre-dashboard methods of retrieving data	User reports data anomalies when using dashboard	IT Mgr.
R2	Resource shortage	Mitigate: Push schedule back to ensure quality is not impacted, and notify management	Resources will be re-allocated from other projects	Delay of more than 2 days on AON critical path	Project Mgr.
R3	User backlash	Mitigate: Collect user feedback and integrate enhancements in future releases	Provide extra user support and training	Department directors provide negative feedback from staff	HR Mgr.
R4	Budget overages	Mitigate: Department managers will meet to review project scope and identify areas to cut cost	Request staff to find ways to streamline processes	Budgeted hours are projected to go over budget	Project Mgr.
R5	Software issues	Mitigate: Internal software issues will be addressed by FPD IT department. Vendor will address and correct issues with dashboard	IT/vendor will determine which aspects of dashboard is affected and advise staff	Dashboard use failure or user reported issues	IT Mgr.

CHANGE REQUEST PROCESS

The below diagram depicts the change request process from submission to implementation. All requests for changes must be reviewed by the FPD DM EOC.



CHANGE REQUEST FORM

The Change Request Form will be used to track proposed changes to the project. Below we have created a Change request form for each Risk that has been identified.

R1 – Data Integrity Issues

CHANGE REQUEST FORM

Project Name	FPD Metrics	Project Sponsor	Paul Reporting, CFO
Request Number	101	Change Requested By/Date	2/9/2020
Originator	Elon Musk	Review Request By	

Description of requested change

R1 - Data Integrity Issue: Requesting IT to resolve an issue with dashboard retrieving shipping status from database tables.

Reason for Change

Staff has encountered issues with retrieving data from shipment status table when using the dashboard.

Areas of impact of proposed change

- ☐ Scope
- ☑ Resources
- ☑ Cost, estimated imact $ $500 estimated by IT staff
- ☐ Schedule
- ☑ Risk
- ☐ Other: please specify

Disposition	Priority	Funding Source	Comments
☑ Approve ☐ Approve as amended (see comments) ☐ Disapprove ☐ Deferred	☐ Emergency ☑ Urgent ☐ Low	☐ Customer ☑ Sponsor ☐ Other	Sponsor

Sign-off Approvals

Project Manager		Date	
Project Sponsor		Date	
Project Customer		Date	

R2 – Resource Shortage

CHANGE REQUEST FORM

Project Name	FPD Metrics	Project Sponsor	Paul Reporting, CFO
Request Number	102	Change Requested By/Date	2/9/2020
Originator	John Resources	Review Request By	

Description of requested change

R2 - Resource Shortage: Resource needs have been identified for Critical Path Activities

Reason for Change

Two employees that support Work Packages for Critical Path Activities are out of office due to family emergencies. Replacements are needed immediately.

Areas of impact of proposed change

- ☐ Scope
- ☑ Resources
- ☑ Cost, estimated imact $ $1800
- ☐ Schedule
- ☑ Risk
- ☐ Other: please specify

Disposition	Priority	Funding Source	Comments
☑ Approve	☑ Emergency	☐ Customer	Sponsor
☐ Approve as amended (see comments)	☐ Urgent	☑ Sponsor	
☐ Disapprove	☐ Low	☐ Other	
☐ Deferred			

Sign-off Approvals

Project Manager		Date	
Project Sponsor		Date	
Project Customer		Date	

R3 – User Backlash

CHANGE REQUEST FORM

Project Name	FPD Metrics	Project Sponsor	Paul Reporting, CFO
Request Number	103	Change Requested By/Date	2/9/2020
Originator	Mike Dell	Review Request By	

Description of requested change

R3 - User Backlash: Users do not understand metric definitions and importance to dashboard

Reason for Change

Several employees have voiced their concern over the dashboard calculations. Training is needed to educate team members on KPI's and the associated calculations.

Areas of impact of proposed change

- ☐ Scope
- ☑ Resources
- ☑ Cost, estimated imact $ $1500
- ☐ Schedule
- ☑ Risk
- ☐ Other: please specify

Disposition	Priority	Funding Source	Comments
☑ Approve	☐ Emergency	☐ Customer	Sponsor
☐ Approve as amended (see comments)	☑ Urgent	☑ Sponsor	
☐ Disapprove	☐ Low	☐ Other	
☐ Deferred			

Sign-off Approvals

Project Manager		Date	
Project Sponsor		Date	
Project Customer		Date	

R4 – Budget Overages

CHANGE REQUEST FORM

Project Name	FPD Metrics	Project Sponsor	Paul Reporting, CFO
Request Number	104	Change Requested By/Date	2/9/2020
Originator	Don Budget	Review Request By	

Description of requested change

R4 - Budget Overages: Activities are projected to go over the anticipated estimates

Reason for Change

Budget Overages are anticipated for Critical Activities which will result in higher than expected costs. These overages have been identified as Risks (R4) and need immediate attention.

Areas of impact of proposed change

- ☐ Scope
- ☐ Resources
- ☑ Cost, estimated imact $ $1800
- ☐ Schedule
- ☑ Risk
- ☐ Other: please specify

Disposition	Priority	Funding Source	Comments
☑ Approve	☐ Emergency	☐ Customer	Sponsor
☐ Approve as amended (see comments)	☑ Urgent	☑ Sponsor	
☐ Disapprove	☐ Low	☐ Other	
☐ Deferred			

Sign-off Approvals

Project Manager		Date	
Project Sponsor		Date	
Project Customer		Date	

R5 – Software Issues

CHANGE REQUEST FORM

Project Name	FPD Metrics	Project Sponsor	Paul Reporting, CFO
Request Number	105	Change Requested By/Date	2/9/2020
Originator	Bill Gates	Review Request By	

Description of requested change

R5 - Software Issues: Compatibility issues have been identified with supporting Software

Reason for Change

Bill Gates team identified an update issue that was supposed to be addressed with existing software. A single resource is needed to address the issue which is believed to be a moderate risk.

Areas of impact of proposed change

- [ ] Scope
- [x] Resources
- [x] Cost, estimated imact $ $250
- [ ] Schedule
- [x] Risk
- [ ] Other: please specify

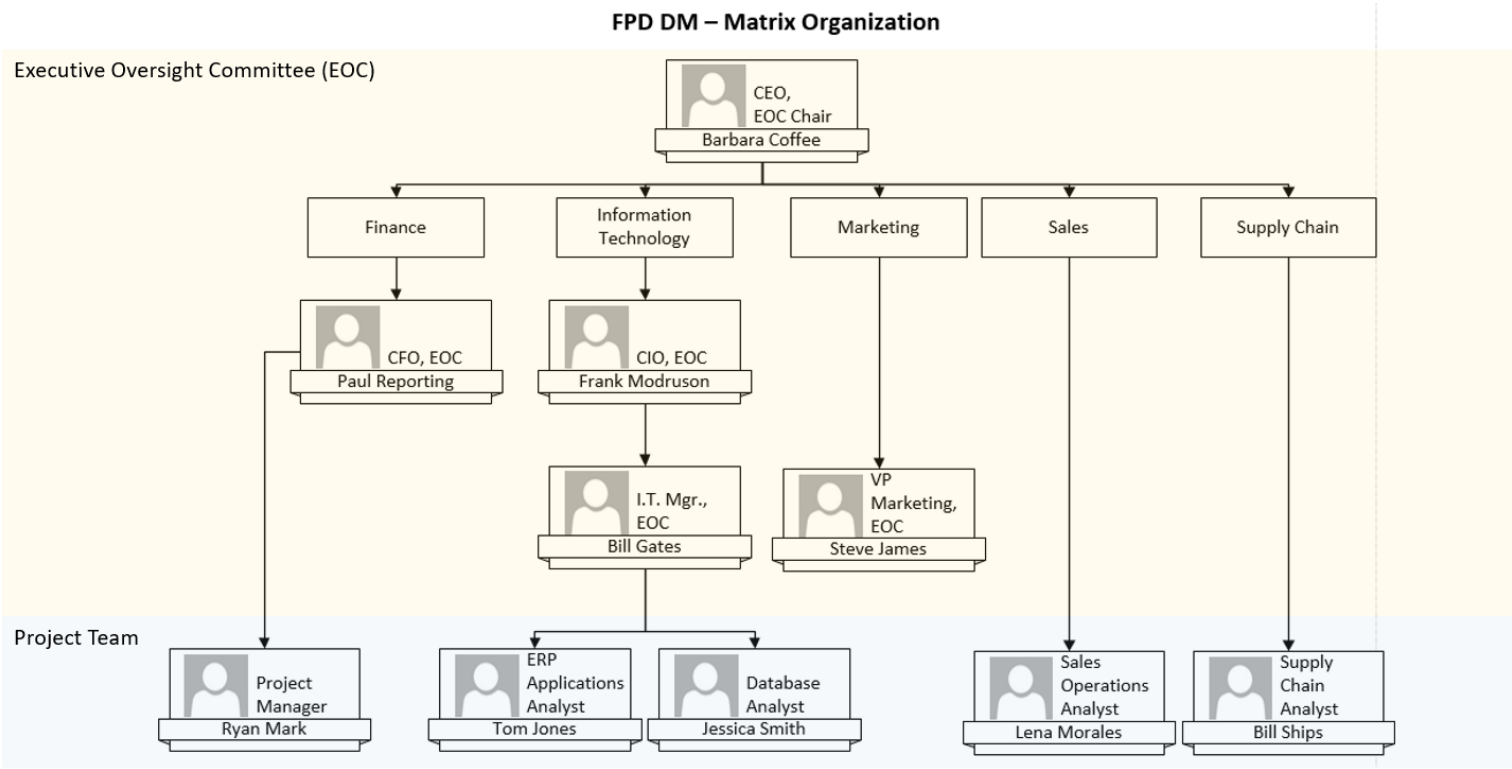
Disposition	Priority	Funding Source	Comments
[x] Approve	[ ] Emergency	[ ] Customer	Sponsor
[ ] Approve as amended (see comments)	[x] Urgent	[x] Sponsor	
[ ] Disapprove	[ ] Low	[ ] Other	
[ ] Deferred			

Sign-off Approvals

Project Manager		Date	
Project Sponsor		Date	
Project Customer		Date	

PROJECT ORGANIZATION CHART

The organization type for FPD DM has been identified as a Matrix Organization. This is identified by the horizontal project management structure that is overlaid on the normal functional hierarchy. Furthermore, the FPD DM Matrix can be further defined as a “Strong Matrix” based on the responsibilities of the project manager. For example, this type of Matrix would provide the project manager with control of certain aspects of the project such as scope trade-offs, the project budget, and the assignment of functional personnel.



FEASIBILITY

The feasibility analysis evaluates the projects potential for success.

Background

FPD DM is a beverage company that produces coffee, tea, and organic tea. These products are sold in multiple packaging configurations. Customers of FPD DM consist of large-box retailers, specialty chains, and grocery chains.

Currently FPD DM does not have metrics to guide key decision making and planning. As a result, this has impacted customer performance related to shipment accuracy, on-time deliveries, and order lead-time fulfillment.

The objective of this project is to develop a metric dashboard that will provide FPD DM management with information that can support decision making and improved performance. Additionally, by establishing a dashboard it will facilitate information related to:

- product line sales analysis
- packaging performance by product line analysis
- product line by customer analysis
- order delivery performance by product line and customer
- distribution center shipping performance to customer

Technical Feasibility

Initial planning assessments indicate that project resources and systems meet the technical requirements for this project. Additionally, potential risks have been identified and appropriate contingency plans have been included in the project plan.

Financial Feasibility

Our assessments indicate that the estimated project costs including a 10% contingency will be within the specified budget of $250,000.

Schedule Feasibility

Our analysis of project deliverables, duration, and timelines indicate that the FPD DM dashboard can be delivered within the specified requirements of 6-months.

RESPONSIBILITY MATRIX

The Responsibility Matrix provides project tasks and who is responsible for that task (i.e. “R”). It also indicates project team members whom support or assists with that task (i.e. “S”).

	Project Team				
Task	**Ryan Mark**	**Tom Jones**	**Jessica Smith**	**Lena Morales**	**Bill Ships**
Collect User KPI Requirements	R		S		
Define KPI's	S		R	S	S
Collect User Data Requirements				S	
Define Data Sources	S	S	R		
Decide Analytics to be Included	R		S		
Develop User Interface	S		R	S	S
Collect User Requirements	R				
Builds User Interface	S	S	R		
Obtain User Acceptance	R		S		
Develop Data Extraction Plan	S		R	S	S
Determine Data Retrieval Method	R				
Conduct Data Cleansing				S	
Implement Repository for Cleansed Data	S	S	R		
Develop Data Analytics Plan	R		S		
Perform Data Calculations	S		R	S	S
Perform Metrics Build	R				
Create KPI Graph Output	S		R	S	S
Build Data Summary Output	R				
Create Visual Output				S	
Initiate User Testing (UAT)	S	S	R		
Plan FPD Training	R		S		
Conduct AI Tool Training	R				
Conduct Dashboard Training				S	
Perform Launch Readiness	R		S		
Initiate UAT Validation				S	
Deployment Project Plan	R		S		
Provide EOC Status Reports	S		R	S	S
Conduct Team Meetings	R				
Monitor Project Budget				S	
Address Project Change Requests	S	S	R		
Submit Software / Doc Requirements		R		S	

Letter	Description
R	Responsible
S	Supports / Assists